Saskatchewan
Tourism and
Small Business

MEADOW LAKE PROVINCIAL PARK
ACCOMMODATION/FOOD SERVICE
MARKET OPPORTUNITY STUDY

March, 1984

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BAHNUIK & WRIGHT

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EXECUTIVE SUMMARY

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This study is one of a series of studies undertaken by Saskatchewan Tourism and Small Business and Saskatchewan Parks and Renewable Resources. The objective of the study was to identify and quantify the market for fixed roof accommodation and food services in the Meadow Lake Provincial Park.

Meadow Lake Provincial Park is located 190 kilometres north of North Battleford. The Town of Meadow Lake is located thirty kilometres south of the park. The west boundary of the park is thirteen kilometres east of the communities of Grand Centre/Cold Lake, Alberta.

The population in the surrounding area is sparse with the Town of Meadow Lake serving as the main retail and service centre. Visitors from Alberta would probably use the communities of Grand Centre/Cold Lake, Alberta as places to purchase their last minute holiday requirements, primarily because of no sales tax in Alberta.

Visitors are attracted to the Meadow Lake Provincial Park for the outdoor recreational opportunities and the natural setting of the park. Visitors tend to be family oriented, campers and fishermen. The prime season to visit the Meadow Lake Provincial Park tends to be from late May to early September.

Park user surveys have shown that two of the main reasons for visiting the Meadow Lake Provincial Park are for the abundant fish resources and the scenic attributes of the Park. Thus it is important to sustain the natural aspects of the Park as well as developing high quality recreational facilities.

It has been concluded that accommodation and food services in the Meadow Lake Provincial Park could be commercially viable subject

to achieving a variety of conditions based on the factors of successful criteria.

There would seem to be sufficient demand on a year round basis to build an average of five to ten cabins per year, for the next five years, in a number of locations throughout the park. Based on the present and future demands, locations that would seem appropriate would be in the area of Greig/Kimball Lakes, on the east side of the park, and Pierce Lake and Lac des Isles on the west side of the Park. Some considerations that should be made by the private investor are:

- Awareness of a long term park development plan will provide guidance for private sector investment,

- Results of a year round vehicle count to the Park and user characteristics,

- The extent of cottage use during the shoulder and winter months,

- The variety of activities and facilities that may be extended on a year round basis to encourage visitations to the Park on a year round basis,

- A long term investment and development strategy by the investor,

- Long term expansion plans by the existing resort/outfitters in the Park,

- To enhance the attractiveness of the park and proposed accommodation/food service facility, future plans should consider a facility offering a games room for children and adults, sauna, whirlpool, a 'departure' room for cross-country skiers, snowmobilers and snowshoers. This would be expecially desirable in the winter months and inclement weather during the summer.

Although a food service facility may be a profitable venture for June, July, August and September, the cost to build a facility to meet the demands and expectations of visitors could not be profitable for those few months. A food service facility could be viable in approximately two to three years once the following conditions are considered or met:

- Awareness of a long term park development plan will provide guidance for private sector investment,

- Results of a year round vehicle count to the Park and user characteristics,

- The extent of cottage use during the shoulder and winter months,

- The variety of activities that may be extended on a year round basis to encourage visitations to the Park on a year round basis,

- Costs associated with operating year round in the Park should be determined as well as which costs will be private or government responsibility. Some items that could be considered as additional costs would be winterizing the water supply, sewage disposal, power and natural gas supply, road access and maintenance, security patrol, etc.

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Bahnuik & Wright acknowledges the important contribution of many individuals and agencies for sharing information and ideas. All contacts are listed in Appendix B.

A review of the work was undertaken by a Steering Committee composed of representatives of Saskatchewan Tourism and Small Business, and Saskatchewan Parks and Renewable Resources. Steering Committee members are as follows:

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1.0 INTRODUCTION

Visitors to Meadow Lake Provincial Park, and local entrepreneurs, have suggested there should be improved accommodation and food services provided within the Park. Such services would be incremental to the existing capacity, varied in type, and should also be of a higher standard than presently exists in the Park. In response to these suggestions, Saskatchewan Parks and Renewable Resources and Saskatchewan Tourism and Small Business had initiated this study to evaluate the market for such facilities. The primary objective of this study was to identify and quantify the market for fixed roof accommodation and food services in the Meadow Lake Provincial Park. For the purpose of this study, tourism facilities and services were inventoried within the perimeter of Cole Bay (north), Green Lake (east), St. Walburg (south) and Cold Lake/Grand Centre, Alberta (west). The inventory is included in the Appendices of the report, specifically Appendix A.

1.1 Study Approach

The approach used to achieve this objective was a description of the market and it's implications for accommodation and food service development in Meadow Lake Provincial Park. Any new developments would be incremental to the existing tourism industry base, therefore a clear understanding of this base is a necessary first step to the study. This tourism industry base will indicate utilization of existing capacity, range of services, quality, and location of existing facilities. The second section of the study was a description of the current market visitor characteristics, and their implications for accommodation and food services in Meadow Lake Provincial Park. The market section examined the dynamics of the market and future demand. The market data was then evaluated for it's implications for the feasibility of accommodation and food service against those factors which characterize viable commercial developments. The last section of

the study presents the conclusions and makes recommendations on actions which should be taken to develop new accommodation and food services in Meadow Lake Provincial Park.

1.2 Park History

Meadow Lake Provincial Park is located approximately 325 kilometers northeast of Saskatoon and 190 kilometers north of North Battleford. The western boundary of the Park forms part of the Alberta/Saskatchewan border. It is approximately thirteen kilometers east of the community of Cold Lake, Alberta. The Town of Meadow Lake is located thirty kilometers south of the Park. The Park consists of approximately 157,088 hectares (387,872 acres) which is approximately 15 kilometers (10 miles) wide and 110 kilometers (68 miles) long from east to west.

The region surrounding the study area has a colorful and important role in the history of Western and Northern Canada. The area is on an old fur trade route and was used as a wintering post by the North West Company in the 1790's (The Park is also near the last battle site in Canada; 1885). Many early fur trading posts were established in the area as fur trapping and trading at the time were an important economic activity in the area. In later years, trapping assumed a secondary role and tended to supplement incomes derived from farming, fishing, and laboring.

The early 1900's brought increased settlement to the area. Homesteads were established with most agricultural cultivation taking place south of the Waterhen River. However, only a very small percentage of the land was actually cleared and broken within what is now the Park area. Lumbering activities were started on some of the settlers permits to supply the local demand for farm construction materials.

By the 1950's the area had become a Provincial Forest and supported a variety of economic activities. Permits and leases

had been issued for grazing and haying in riverine pastures and meadows. Other permits authorized the harvesting of fish, fur, and timber. About this time, mink ranches were established in the eastern portion of the Park area. By 1956, there were a total of ten ranches operating in the Flotten-Waterhen area.

During the 1940's and early 1950's, the area's recreational potential began to attract attention from some of the surrounding communities to the south and east. Fishing and hunting were popular activities and recreational uses included development of summer cottages, institutional camps, and outfitter's facilities. By 1956, approximately 100 cottages had been built on six different lakes in the area, as well as three institutional camps and seven commercial outfitters located in the area. The Saskatchewan Department of Natural Resources had also developed some public recreation facilities at a few picnic sites in the area. On March 10, 1959, the area was formally established as Meadow Lake Provincial Park.

The Park is characterized by Boreal Forest interspersed with open meadows and abandoned farmland. Twenty-three percent of the Park area is covered by lakes with the Waterhen River system running westward across the Park. Present land use is varied and ranges from resource based activities to numerous recreational and natural interpretive uses.

Meadow Lake Provincial Park is classified as a Natural Environment Park and is intented to provide high quality outdoor recreational opportunities which compliment the natural setting of the Park. The Park serves as a destination, 'extended stay' type of park for the northwestern part of Saskatchewan, as part of the Provincial Park System. The forests, numerous lakes, and attractive rivers in the Park provide a wide range of high-quality, nature-oriented outdoor recreation opportunities for local residents and visitors from outside the region.

1.3 Success Criteria

One of the most crutial aspects in the feasibility of any commercial business is an adequate market base to support the costs that would be incurred in constructing and operating the business. The question becomes; if the potential market is insufficient to bear the costs within reasonable probablilities, then some party must be willing to bear the costs if the business is to proceed to construction and operation. If a business is to be established purely on a commercial basis and be successful, it is critical that the price of the product or service is set at a level the consumer is willing to pay. This is particularly important in a competitive environment where the consumer will balance the product value to get the best quality and amount of product for his dollar expenditure. In the recreation/tourism field, seldom is there a monopoly situation and if one supplier offers a poor product for value, the consumer will shift his purchases to other potential suppliers in other areas.

There are many different types of fixed roof accommodations which can be classified according to function; transient/commercial (hotels, motels, and motor inns), apartment-hotels, resorts, tourist homes, and recreational cabins/cottages. For purposes of this study, we will only discuss the latter three types.

Accommodation type should be characteristic to meet expectations and needs of visitors to an area. If visitors to an area are interested in outdoor natural recreational activities, then the facilities should be designed and located with their interests in mind. It is important to keep in mind that an accommodation business sells comfort, convenience, and hospitality; a "willing-to-serve" attitude which requires self-control and flexibility to meet the wide ranging needs of the public. The facilities must be clean and well maintained. Location of the facilities is critical because if the site is not appropriate, even a big advertising budget and superior management cannot assure success. A development should have a minimum of 20% to 30% equity financing; other-

wise it is likely to be handicapped by an excessively high debt load. An equally important requirement when operating a facility that is vulnerable to seasonality, is working capital. Inadequate working capital in the first three to five years can also result in failure. One industry rule-of-thumb used in evaluating an accommodation development puts the total value at six to seven times the potential annual net income, before depreciation, financing costs, and income taxes. Success is attained when sufficient units are filled on sound financial terms, at a price customers will pay. The real challange is to keep rooms filled, seven days a week, because the owner deals in a highly perishable commodity - guest rooms. The potential night's revenue from an unsold guest room is gone forever.

The food service business has been traditionally categorized as "easy entry - limited skills - high risk". An ironic factor about the business is that the size of invested capital and physical premises does not always assure success. In fact, approximately 20% of annual retail business failures are food services and only half of all food service operations maintain the same ownership for five years or more. Survival requires dedication to:

- location where people are or can get to conveniently
- organizing a business that is a manufacturing plant
- managing a "service" business with due respect for the servers and the served
- maintaining a balanced value-price relationship to assure an adequate profit while assuring the customer gets adequate value for his money
- good management

Thus, the purpose of this study was to determine if an adequate market exists to support development of accommodation and food services business in Meadow Lake Provincial Park. The history and setting of the Park have been discussed as well as some of the crutial requirements for success in the two types of businesses. We shall now turn our attention to the current existing tourism industry base.

2.0 EXISTING TOURISM INDUSTRY BASE

This section addresses the existing accommodation and food services in Meadow Lake Provincial Park and the surrounding area.* Rental accommodation currently provided within the Park is provided by seven resort/outfitters of which one leases facilities from the government. These facilities are as follows:

- Waterhen Lake
  - M & N Resort (12 cabins)
  - Tawaw Cabins (14 cabins)
  - Waterhen Lake Resort (6 cabins)
- Flotten Lake Resort (6 cabins)
- Lac des Isles
  - Lac des Isles Resort (15 cabins, government-owned)
  - Big Island Cove '80 (15 cabins)
- Pierce Lake Lodge (9 cabins)

These 77 units are capable of accommodating a maximum of approximately 400 persons at one time. The Greig Lake Store has been given permission to construct five additional rental unts. No construction date has been determined.

Most of these cabin facilities were built many years ago to serve the lower period, informal market segment which is primarily interested in summer water-based activities, such as fishing. The majority of these facilities would normally be considered non-modern. They provide a limited variety of facilities and services usually associated with outdoor-oriented vacation requirements. Most resorts in the Park have central washroom/shower facilities and only four cabins have pressurized water systems.

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*See Appendix A for details.

In addition to these rental facilities located in the Park, there are three camps in close proximity to the Park, and another 21 camps are located within a 165 kilometer (75 mile) radius of the area. In the Town of Meadow Lake, 35 kilometers south of the Park, are three motels and two hotels with a total of 145 rental units. The Town of Loon Lake, approximately 45 kilometers south of the Park, has another 16 units. The rental units in these communities are too far away from the Park to be patronized by potential visitors. In fact, conversations with one of the motel owners in Meadow Lake revealed that most of his clientele were government employees and commercial travellers and few tourists, even in the peak summer months.

At present, there is only one food service business located in the Park. This is a fast food outlet located within the Greig Lake core area. This outlet operates under a fast food concession lease from the Park. There is no sit-down restaurant type food service located in the Park. The closest ones are located in the communities of Loon Lake, Meadow Lake, Dorintosh, Goodsoil, and Pierceland. As in the case of accommodations, these food services are too far away from the Park to be patronized by Park visitors except on their way to or from the Park.

The current situation with both rental accommodations and food services is a very poor supply. Although there are rental accommodations in the Park, some do not meet the needs and expectations of today's more demanding travelling public. Food services are virtually non-existent in the Park. Visitors to the Park are provided with few alternatives but to bring trailers and campers or build their own accommodations in the form of cottages, if they want normally acceptable lodgings. Likewise, they must prepare all of their own meals except for fast foods.

3.0 MARKET ASSESSMENT

3.1 Current Market Demand

Meadow Lake Provincial Park had the third highest number of visitations[1] of any Saskatchewan provincial park in 1982. Duck Mountain and Moose Mountain parks were the only ones to have a greater number of visitations. The number of visitations to Meadow Lake Provincial Park are shown in Table I.

TABLE I

Meadow Lake Provincial Park Visitations
1972 - 1982

Year	Visitations	Change from Previous Year
1972	76,661	-
1973	96,961	+26%
1974	82,779	-15%
1975	71,742	-14%
1976	90,374	+25%
1977	97,346	+ 8%
1978	89,086	- 9%
1979	75,137	-16%
1980	75,526	+ 1%
1981	110,366	+46%
1982	78,735	-29%

Source: Saskatchewan Parks and Renewable Resources.

Table I indicates there has been considerable fluctuation in the number of visitations between 1972 and 1982 rather than any definite trend. The 1982 figures must be taken with considerable

[1]Visitations is defined as the number of vehicles entering the Park.

caution as their measurement base is not the same as in previous years. There was one less traffic counter than in previous years, so actual visitations would undoubtedly be somewhat higher, although the exact amount is unknown. Actual number visitations in 1981 were second only to Moose Mountain Provincial Park.

In terms of the number of camper days, Meadow Lake Provincial Park was second only to Moose Mountain Provincial Park in 1982. Meadow Lake Provincial Park had a total to 83,564 camper days; only 3% less than Moose Mountain. Camping figures for Meadow Lake Provincial Park are shown in Table II below.

TABLE II

Meadow Lake Provincial Park Camping
1972 - 1982

Year	Camper Days	Change from Previous Year
1973	85,450	-
1974	98,964	+16%
1975	-	-
1976	117,639	-
1977	123,903	+ 5%
1978	113,202	- 9%
1979	102,043	-10%
1980	111,780	+ 9%
1981	108,380	- 3%
1982	83,564	-23%

Source: Saskatchewan Parks and Renewable Resources.

Table II shows that there is less fluctuation in camping than there has been in vehicles entering the Park. However, the peak year for camping was 1977 and since that time there has been a declining trend; most particularly in 1982. The figures for 1983, when they are available, will indicate whether 1982 was an

abnormality or the start of a more rapid decline in the trend. Between 1972 and 1982, Meadow Lake Provincial Park experienced the highest camper days utilization of any provincial park in the Province until 1982 when it fell to second place behind Moose Mountain.

Most of the campers at Meadow Lake Provincial Park were from Saskatchewan and Alberta. During 1982, 51% were from Saskatchewan and 45% were from Alberta. This represents a decrease from 60% from Saskatchewan in 1979 and an increase from 37% of visitors from Alberta campers in the same period. The majority of Saskatchewan campers came from Saskatoon, Regina, Prince Albert, and Meadow Lake during 1981. Approximately 4% of campers in 1982 were from other provinces or countries.

Campers brought a variety of accommodations with them to Meadow Lake Provincial Park. Trailers (32%) were the most popular followed by truck campers (20%), cabin trailers (17%), tents (14%), and motor homes (12%).

In 1982, a park user survey* was conducted on a small sample of campers in Meadow Lake Provincial Park. This survey found that 30% of respondents went to the Park because of the good fishing. Swimming, boating, canoeing, and nature hikes are other important activities to Park users.

Generally, camping visitors tended to stay approximately two days at a particular campsite in the Park. They tended to stay longer at larger campsites than smaller campsites and there was no discernable trend over the past five years in length of stay. For example, campers at the Kimball Lake campground (205 campsites) stayed an average of 2.36 days in 1977 and 2.4 days in 1981. At

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*The reader should be aware that campers prefer to move from campsite to campsite within a campground. It is possible for a camper to stay seven to ten days in one campground and move three or four times.

the Greig Lake Campground (102 campsites), campers stayed an average of 1.7 days in both 1977 and 1981. But at Mistohay campground, campers stayed 1.6 to 2 days on average. The longest average stays were at Pierce Lake campground with an average stay of 2.3 to 2.7 days. Without a survey of campground users, it is difficult to give the reasons for the differences in the length of stay. It could be different amenities and services at different campgrounds, the difference in fishing, or some mix of reasons.

Most visitors to Meadow Lake Provincial Park went to the Park as their main destination. This is because the Park is not on a major through traffic artery which carries inter-provincial traffic. Many visitors come to the Park because it is relatively close to home (23%). The Park tends to fill a regional recreation need for nothern and central Saskatchewan as well as northeastern Alberta. Even though it serves a regional need, many visitors drove significant distances to get to the Park (22% drove 3+ hours in a limited sample survey of campers done by Saskatchewan Parks and Renewable Resources).

The '1982 Visitation and Outdoor Recreation Statistical Report' indicates that in the use of renewal camping permits in provincial parks, Meadow Lake experienced the second highest average stay per renewal permit of 3.4 nights. The highest of 3.8 nights was experienced at Good Spirit Lake. Duck Mountain and Greenwater Provincial Parks both experienced an average stay of two nights.

Most of the above discussion has concentrated on the characteristics of the camping visitor, because information is more readily available on this type of visitor. However, the other type of visitor which represents a potential market for food services is the one who currently owns a cottage in the Park. Such visitors may wish to utilize commercial food services as an alternative to cooking in their cottages. However, there is insufficient information available on this potential market. They certainly do not represent a potential market for fixed roof accommodation, unlike the camping visitor.

One possible reason for the predominance of travel trailers in the Park, is that to many of these visitors it represents the only way they can stay in the Park in relatively modern accommodations. They may not camp for the outdoor experience but as a necessity to visit the Park.

Accommodation and food service do not necessarily have unrelated markets. Accommodations without cooking facilities are dependent on outside food services.

In addition to the above market demand characteristics, there are a number of other important market factors which have a bearing on the commercial success of any new accommodation facilities and/or food services in the Park. These primarily deal with competition and market dynamics. The following points are important considerations in the evaluation of the market:

- Although there is a need for accommodation and food services in the park during the summer months, the need is questionable for the remainder of the year. Family type cabins, open year round, could be viable; but long term commitments are needed from Saskatchewan Parks and Renewable Resources and Saskatchewan Tourism and Small Business to promote and develop other winter activities in the park and region (i.e. cross-country and snowmobile trails, roads open during the winter, promotional and advertising support for the region from the tourism department). Unless the season can be expanded, it is doubtful if the capital costs can be amortized for a reasonable length of time to make the project commercially viable,

- The current accommodation and food service businesses do not possess any dominance or strength. Other than campgrounds, the rental cabins are profitable mainly because there are no accommodation alternatives. The majority of facilities are non-modern which usually means minimum capital investment,

- The prices (where available) of the existing accommodations are

considered too high in relation to the quality of the facilities and amenities offered. The prices range from $12 to $38 per cabin per night,

- Sales or marketing of rental cabins is limited to distributing individual brochures and minimal advertising. The majority of business is repeat customers and the results of word of mouth advertising. The fact that the facilities are located in a Provincial Park provides more free publicity than an operator would receive outside a park for equivalent facilities,

- Rental cabin operators interviewed, indicated they were filled to capacity during July and August, with approximately 50% occupancy during June and September, and approximately 25% occupancy during May, October and November. Most facilities closed for the winter months. Those that did offer a few cabins had them occupied on weekends and experienced little occupancy during the week.

To this point, the market has been described in relatively static historical or current terms. However, any accommodation or food service facilities would be built for the future and would have to survive in a future market. It is therefore important to look at the growth potential of the market.

It is likely that the camper, family and fishing oriented market will experience a steady growth. This will be dependent, in large part by the maintenance of adequate fishing stocks in the Park. If they were to become depleted, the Park would lose a large number of current visitors. Any improvement in the resource can only improve the Park's attractiveness to this market segment.

The largest increase in market demand would be in the deluxe cabin category. Based upon statistics and interviews with Duck Mountain and Greenwater Lake Provincial personnel, it indicated that a strong demand exists for deluxe year round cabins. During the summer, deluxe cabins are usually rented first and less modern facilities as a second choice. In Duck Mountain Provincial Park

seniors rent deluxe cabins and golf while young families rent non-modern cabins and participate in fishing and beach/playground activities. Hunters and fishermen rarely use deluxe cabins.

Duck Mountain Provincial Park, which is located on the Saskatchewan-Manitoba border, attracts users from as far away as Regina and Saskatoon during the winter months. This indicates there is a market demand for winter recreation in Saskatchewan and a potential for increased winter facilities in Meadow Lake Provincial Park to meet this demand.

The existing privately-owned facilities within Meadow Lake Provincial Park do not offer any competitive advantage to potential new facilities. This is one of the major factors favoring new accommodation facilities as they would have a virtual monopoly in the deluxe segment of the market.

Improved new facilities combined with superior natural features can have a competitive advantage over any existing cabin developments. This new competition should not affect the viablity of existing cabin facilities as the new market will probably attract a new and higher income clientele.

The present market of campers, families and fishermen is stable and is unlikely to experience any significant decline or growth in the near future.

There is likely a sufficient demand to build an average of five to ten deluxe (two and three bedroom) cabins per year for the next five years. The cabins would have to be built by an owner-operator capable of injecting a lot of sweat equity by building the cabins himself in order to minimize construction costs and debt load. At present, lumber and logs are very inexpensive and this situation should remain for the next few years. It also applies to other construction services and materials.

The rationale for suggesting the range of five to ten deluxe cabins per year was as follows:

- The great dependency on the summer season would probably discourage a large, financially strong, company who could afford to build more units, from entering the market. This would mean a smaller sized company or individual would probably be the alternative to consider this type of venture. This would mean building a smaller number of deluxe units that could be financed within the capabilities of the smaller company or individual,

- It will take some time in order to build up the occupany in the shoulder and winter seasons. During this period, of probably two to three years, it would be prudent not to carry a large debt load,

- Any more than five to ten units per year would affect the viability and expansion plans of existing operators within the Park,

- Based upon the ten units in Duck Mountain Provincial Park and the eight units in Greenwater that are open year round, the range of five to ten units would be a reasonable starting point,

- Condominiums or a motel were not considered because they simply would not be characteristic with the environmental theme of the park. The present outdoor oriented market characteristics would further support the preference for cabin accommodation.

By staging accommodation development over a number of years, the operator can modify or improve the design of future new cabins to reflect new market demand characteristics. Accommodation development staging would also give management experience to inexperienced operators prior to undertaking management of a large complex.

The large number of Park visitors during the summer months would also be good exposure to enhance return visits, particularly in the shoulder and winter seasons.

The potential geographic market could be a north/south line, as far east as Saskatoon to Swift Current and the United States border; and on the Alberta side, as far west as Edmonton south to Lethbridge and the United States border.

Efforts should be made within these market areas to communicate the attributes of the Park, it's natural features, and facilities, to encourage more visitations. Alberta, particularly the north-eastern portion, should be the target for much of the advertising and promotional efforts. Although Alberta has suffered a population decline in the present recession, due to it's economic dependence on the oil and gas industry, conventional oil and gas development should resume in the near future. Recently there have been announcements of several small plants and the Esso heavy oil plant at Cold Lake is to be build in stages, rather than in one large project. There is also the possibility of some heavy oil developments at Lloydminster. Although this market area is now unlikely to experience a rapid population rise, slower growth appears more likely to actually take place. This gives additional time for Meadow Lake Provincial Park to develop its facilities and carry out promotional efforts on a sound viable basis.

3.1.1 Demand - Population

The area around Meadow Lake Provincial Park has been experiencing slow economic growth for the past decade. A period of optimism ran high when the possibility of the Esso project at Cold Lake, Alberta was announced, but the situation now seems to suggest that any further developments at Cold Lake will be relatively small in comparison to the initial "mega-project". This will not create any significant impact on the study area or any great population increase over the short-term.

With respect to the heavy oil upgrader proposed for Lloydminster, it is probable that this project will proceed in view of the recent developments on the Alberta side. The heavy oil upgrader in Lloydminster will certainly create many hundreds of jobs during

the construction period, but it is not known the number of permanent jobs that will be created once the upgrader is operational.

In any event, it is not anticiapted that the additional construction workers will impact the Meadow Lake area during the construction period. As for the permanent jobs created, it is anticiapted that many of those positions will be taken by the large unemployed segment of the oil industry in the Lloyminster and Grande Centre/ Cold Lake, Alberta areas.

Esso Resources may spend another $250 million in 1984 on each of its third and fourth Cold Lake phases of the heavy oil project. It is possible that all six phases may be built by 1988. As many as 400 jobs will be created when all phases are on stream.

Amoco Canada Petroleum Co. Ltd. has also announced a $1.8 billion heavy oil project at Elk Point, Alberta, to be built over the next five to ten years. The number of permanent jobs or increase in population will not be dramatic.

The basic industries of agriculture and forestry in Saskatchewan, and defence in Alberta, are basically stable and not expected to grow appreciably.

3.1.2 Travel Trends and Characteristics

In order to analyze the demand component for the proposed Accommodation/Food Service facility, a brief look at relevant Canadian and Saskatchewan travel trends is necessary.

3.1.2.1 Vacation Travel by Canadians, 1966-1982* and General Trends

- A slight increase in the number of adult Canadians taking more than a weekend vacation; from 52% in 1966 to 59% in 1982,

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* Tourism Canada, June, 1983.

- While a similar percentage increase has occurred from 1966 to 1982, fewer people have taken a vacation which involved at least a one night stay,
- Approximately 70% of the travel in Canada was either by car or motorhome,
- The primary purpose of travel was to visit friends and relatives and this accounted for approximately one half of tourism travel,
- Canadians usually stayed at the homes fo friends or relatives on overnight vacations,
- Commercial accommodations were the second most popular place to stay overnight,
- Canadians spent only marginally more for a vacation in 1981 as compared to 1973 in constant dollars, and
- On average, there are three adults on a trip. The trip usually takes place during the prime summer months of July and August.

Although the Canadian vacation travel market was relatively stable from 1966 to 1982, some important changes did take place:

- The percentage of trips originating in any province was closely correlated with the proportion of the Canadian population residing there,
- A growing number of Canadian began to take multiple vacations during the period, and
- Canada tended to lose its share of the travel done by Canadian residents. A higher proportion of Canadians tended to travel to the U.S. and other foreign destinations. Canadians feel they receive better value-for-dollar spent in the United States. For example, even though there is a 20% to 25% exchange rate, Statistics Canada reports that in the first nine months of 1983, Canadians spent $1.479 billion more abroad than foreign visitors spent in Canada. That is 57% more than during the same period in 1982.

Although the primary purpose of travel was to visit friends and relatives, Canadians also engaged in numerous other activities while on vacation. These included shopping, sightseeing, camping, hiking, swimming, and skiing.

o Skiing

Both downhill and cross-country skiing were rapid growth activities in Canada.

o Recreation Equipment

There have also been changes in national trends of recreation equipment ownership since 1974. Ownership of skis was the most significant trend with about 25% of households owning cross-country skis and 17% downhill skis; a 9% and 3% increase respectively since 1974. Saskatchewan had 19% of households owning cross-country skis in 1982 compared to 13% in 1978. The increase in the ownership of boats and camping equipment has only slightly exceeded the growth in the number of households. On a national basis, 28% of households owned camping equipment. In Saskatchewan this figure was 38% and may be a reflection of better camping opportunities. It was found that camping equipment is more commonly owned by Western Canadians. These trends are significant to camping facilities in the study area. In general, businesses can be more aggressive by making use of natural features, camping facilities, and business centres to attract this growing market.

Vacation home ownership in Canada has grown at the same rate as households. One of the most noticeable trends in recreation equipment ownership has been the decline in the number of households with snowmobiles, from 757,000 in 1980 to 699,000 households in 1982. Saskatchewan experienced a drop from 61,000 in 1980 to 50,000 in 1982.

It is unlikely that there will be a significant increase in travel by Canadians in the immediate future. The Conference Board of Canada conducted a survey in the Second Quarter of 1983 and found that those who plan to travel in the next twelve months have not changed their intentions regarding travel within Canada and that little change can be anticipated in any region. This means that

the study area must look to better penetration of the market in competition with other destination areas as a means of increasing tourism rather than depending on over-all market growth to increase tourism. This places a higher premium on the willingness and ability of the area to be competitive in all aspects of tourism to achieve results.

3.1.2.2 Saskatchewan Travel Trends and Characteristics

Based on the 1980 Canadian Travel Survey for Saskatchewan, some relevant highlights are as follows:

o Profile of the Saskatchewan Traveller

- The automobile, 92.8%, was the main mode of transportation for Saskatchewan residents in the third quarter.

- Accommodation at the homes of friends and relatives was the lowest in the third quarter at 47.9%, with a high of 81.0% in the fourth quarter. Camping ranks second at 24%, as the next most popular form of accommodation used.

- The two main travel age groups were 0 - 14 year of age (27.4%) and 25 - 34 years of age (19.7%).

- The main season for travel was the third quarter, representing nearly 50% of the total for pleasure travel.

- The $9,000 - $14,999 income group represented 30% of the market while the $20,000 - $24,999 income group represented 23.2% of the market.

o Profile of the Saskatchewan Pleasure Traveller

- The automobile represented 97.1% of the travel mode used during the third quarter of 1980.

- Campers generated 35.8% of the person trips in the third quarter of 1980.

- The homes of friends and relatives were used more during the fall and winter months.

- Private cottage use was evident in the spring and summer.

- The 0 - 14 age group and the 25 - 34 age group represented 33% and 20% respectively of the travel market.

- The $20,000 - $24.999 income bracket held 25% of the third quarter market.

Highlights from the third quarter of the 1981 Canadian Travel Survey for Saskatchewan indicated the following:

- The majority of visitors destined for Saskatchewan originated from Saskatchewan 79.9%, followed by Manitoba 4.8%, Alberta 11.8% and Other Provinces 3.4%.

- The majority of visitors destined for the West Central Tourist Region (Tourist Region 3) originated from Saskatchewan 81.1%, followed by Manitoba 1.7%, Alberta 13.1%, and Other Provinces 4.2%.

In reviewing and comparing the origin of visitors in the 1980 and 1979 third quarter Canadian Travel Survey statistics, with the 1981 third quarter it was determined that Saskatchewan and the West Central Tourist Region (Tourist Region 3) were slowly gaining a larger share of the Alberta market, while Region 3 was losing its share of the Manitoba market. At the same time, Saskatchewan residents travelled about the same in Saskatchewan and to the West Central Tourist Region.

3.1.2.3 Highlights of Market Characteristics

Most of the preceding discussion on the travel market has utilized historic data to identify the travel characteristics of visitors generally and the tourism market. The study area should be looking at how this market information will be integrated into its activities to increase the number of visitors to the region and their expenditures while in the area. The area should concentrate its activities on retention of its existing visitor clientele and encouraging it to stay longer. It is also important to cultivate new markets but this can be most effective if the region is aware of general trends in the tourism industry.

First, it is important to realize that the study area has certain physical and institutional characteristics. Many of these characteristics do not have sufficient attraction for a "broad-spectrum" visitor market. However, there are market segments with demand characteristics which the area could effectively satisfy. The special needs of each market segment must be clearly understood and products and services should be developed which are compatible with these characteristics. The availability of these products and services should be communicated to the market segments by appropriate promotional and advertising programs in selected media. For example, there is significant flow-through traffic on Highway 16. Steps could be taken to inform visitors of area products and services at the boundaries of the Province. These could be directed at United States visitors at Western Canadian border crossings, Alberta residents travelling east, and residents of provinces east of Saskatchewan who may be travelling west or north.

Second, promotion and advertising is only part of the approach which could be utilized by the area. It is not only necessary to sell tourism through promotion and advertising but also to deliver the "dream" that it created through advertising. There is a significantly high incidence of repeat travel to destination areas where visitors have had a pleasant stay. Unless there is delivery on expectations, repeat visits to the area may be lost. Any

development effort should emphasize a long-term approach to development and building repeat business. It is like any other business, if you satisfy a customer, chances are the customer may come back and perhaps tell his friends. A few years ago, one major Canadian department store had the philosophy that influencing one customer positively or negatively, indirectly influenced twenty other people. The same type of philosophy could be applied to the region's tourism.

Third, the tourist industry is largely a service business. This means it is highly dependent on the quality of its management personnel. Both management and employees must have the skill, knowledge, and dedication to provide a good experience to visitors. There are two sides to the value for money equation. Too often we indulge in price-cutting without giving sufficient attention to providing better service and value for the money. A satisfied customer is the greatest asset to an effective market share retention program.

Fourth, businesses who provide goods and services to visitors should work harder to persuade the business traveller to take a few days vacation at the end of or during a business trip. Promotional efforts should inform potential visitors of goods and services in the area. They should be informed of attractions and things to see and do. The longer they stay in the area, the greater the expenditures will be in the area rather than outside of it.

Fifth, there is a growing trend to shorter but more frequent vacations. This places a premium on travel time and any destination area with a large market in close proximity, has a great asset. The area has such a market of 500,000 to 750,000 people in close proximity which can be tapped more effectively. More promotional efforts should be directed at residents from a 500 kilometer radius to encourage them to visit the area for a weekend or a short period to capitalize on this trend.

Finally, it is important to realize that market segmentation is growing based on the growing polarization of consumer needs. A tourist is increasingly no longer just a tourist. Different individuals and groups of tourists have different motivations and interests. Unless this is clearly understood, area activities will likely not be optimized and aimed at some preconceived notion of tourist wants, which may only be accurate by accident rather than design. It is very important to understand consumer characteristics, wants, and motivations so that study area activities can be more highly directed.

The objective of tourism activities should be to attract visitors to the region as a means of providing jobs and income to the economy of the area. This is done in a competitive environment in which the consumer will decide which competing area will give him the best value. The visitor will use himself and his dollars to "vote" for the areas he likes best. If the region wants to develop its tourism industry, then it must be prepared to satisfy visitor desires as the visitor sees them rather than providing products and services the local industry feels like providing.

In 1977, L.J. D'Amore & Associates Ltd. conducted a survey of "Tourism in Canada to 1986", for the Canadian Government Office of Tourism. This study identified some significant trends in the overall tourism market including the following:

- Canada's future population will be characterized by a significant upward shift in age structure, with substantial increases in the 20 to 39 and 65-and-over age groups. This means that businesses should consider providing facilities and services which cater to these significant groups rather than basic and standardized facilities that are presently in place.

- The increase in the 20 to 39 age category indicates there will be more people with greater mobility and the propensity to spend money on travelling. This suggests more active-type vacations along with higher expectations for a quality vacation.

- Specialized services and facilities such as specially designed buses, special menus, etc. for the 65-and-over group will be required. It is expected there will be greater opportunities to offer packaged tours directed at the seniors market.

- There will be shorter but more frequent tourism activities due to difficulty in co-ordinating vacations among family members and friends (mini-holidays of three and four days). The market area of a 500 kilometer radius is a major market opportunity on which the region should focus its activities.

- There will be an increase in local recreation, including nature study and active sports due to pressure of sedentary work.

- Demands for more weekend vacation areas will increase.

- There will be an increase in the variety of tourism experiences.

- Travel will be a major way in which social, cultural, and educational experiences are realized.

- Demand will increase for "family camps" and "recreational farms".

- People will increasingly take vacations to learn skills such as tennis, sailing, riding, flying, skiing, fishing, etc.

- There will be a need for more and better interpretation of park features and the social and economic history of communities to reflect increasing interest in history, both natural and cultural.

3.1.3 Market Segment Characteristics

Most successful destination areas "capture" several market segments. The "market" can be divided into three major categories; pleasure, and business-related, and local use.

The pleasure market is composed of two types; the "package tour", and the "individual tourist party". Tour packages are a desireable market to attract as they mean confirmed reservations well in advance. The summer season (mid June to mid September inclusively) is usually the favoured season for general tour groups. The winter season (December to mid April inclusively) is more appealing to a younger segment of tour groups (usually with a skiing emphasis). Superior accommodation and a variety of activities both in a complex and in the surrounding area are highly desireable. Package tours tend to be marketed with a "hard sell" approach. Competition is brisk with international resort destinations vying for business.

Currently, package tours into the Meadow Lake Provincial Park and area are non-existent. If this segment were to be attracted, extensive development would be necessary to ensure continued interest. This would entail an active and expensive marketing thrust and would not likely see significant result for the first three to four years. Unless additional accommodation (capable of providing 40 - 50 rooms) and licensed dining facilities are provided in the Park, it is highly improbable that bus tour groups can be attracted to the existing accommodation. The existing accommodation facilities could not provide adequate single and double occupancy accommodation. In addition, there are no suitable dining facilities available in the Park or in close proximity, other than the town of Meadow Lake and Cold Lake/Grand Centre in Alberta.

It is unlikely that there would be much interest in package tours to Meadow Lake Provincial Park as existing operators are experiencing near capacity occupancy during July and August. Should new dining facilities be established in the Park, further investigation should be considered in attracting the senior citizens and the school group market. These two market groups

could be attracted during the shoulder seasons of May, June, September and October. School groups and cross-country skiers could also be markets for the winter season.

Individual tourist groups travelling to the Meadow Lake Provincial Park tended to be 'fishing', 'camping' or 'family oriented'. Fishermen do not usually seek out 'resort' accommodation, instead preferring lodges or cabins. Lake areas historically are centred around children (usually 6 - 15 years of age) with parents. Specific concerns of this pleasure market are costs (especially with a number of children) and having a variety of activities available (both indoor and outdoor). The prime season in this case would be from the Victoria Day weekend in May through to the Labour Day weekend in September , with a peak in visitations occuring in July and August.

Traditionally, the winter market for Western Canadian destination areas without first class downhill skiing has been extremely weak. However, recently the demand for other winter activities such as snowshoeing, cross-country skiing and snowmobiling has increased the potential for facilities offering these features.

Assuming that the proposed accommodation and food service facilities are found feasible, part of any future plans should consider a facility offering a games room for children and adults, sauna, whirlpool, a "departure" room for cross-country skiers, snowmobilers and snowshoers. This would enhance the attractiveness of the complex, especially during the winter months and inclement weather during the summer.

If a golf course is being considered some time in the future, it would be desireable that the site chosen for the proposed accommoation/food service facilities be adjacent to the golf course to enhance the attractiveness and feasibility of the project.

The business travel segment can be divided into the 'route' sales, convention/meeting, and 'other' subgroups. The convention/meeting market is highly competitive. Considerations, particular to this segment, are adequate meeting facilities (with audio-visual capabilities), a totally resident complex (all function and accommodation areas under one roof), cost, and access (usually not more than 1 1/2 hours travel, although some resorts in extra-ordinary settings or with special attractions can attract this business segment over a considerably greater distance). Additionally, superior quality recreation facilities are desired. The convention/meeting 'plant' available require that a defined, specialized approach to capture a reasonable share of the market is necessary. This is not a market the Park could attract now or in the future unless deluxe accommodation and food services were in operation year round.

The route sales, business and government segment, is comprised of those individuals in the area on business, usually on a regular basis. This segment tends to be a 'stopover' market, with convenience (proximity to the highway and services), and cost, the primary concerns. This is not a market the Park could attract. This relatively small market is presently serviced adequately by the facilities and services in the town of Meadow Lake.

The local market includes residents of those towns and rural areas within or in close proximity to the Meadow Lake Provincial Park. The centres of Cold Lake, Grand Centre, and Medley in Alberta, and Pierceland, Goodsoil, Dorintosh, Loon Lake and Meadow Lake in Saskatchewan are the main local markets to the Park. The Park facilities that may be used by the local market would be accommodation, food service and recreation facilities. However, the small population size of the area makes it difficult to justify the feasibility of a food service facility on a year round basis in the Park. Deluxe cabins would probably be popular with local residents.

4.0 PRODUCT DEVELOPMENT

At present, the fixed roof inventory in the Meadow Lake Provincial Park is primarily geared to the summer vacation clientele; fishing in the spring and hunting in the fall. The summer clientele focuses on water based activities like swimming, boating, and fishing.

4.1 Commercial Rental Cabins

The cabin establishments cater to many groups from the avid fisherman to the water oriented family and the older people who want to simply enjoy the scenery. Although there has always been an interest in ice fishing, snowmobiling and cross-country skiing, it has not been until recently that the market has increased to such a level that some establishments have found it profitable to remain open year round. Most operators have plans to winterize a few units each year, as finances allow, while in one case all the units are winterized and it's a matter of determining the profitablity of opening year round. There was one opeator who expressed an interest in operating year round, however, he could not as his facilities are leased from the Saskatchewan Government. Most operators are encouraged and see the winter market expanding. There seems to be a number of different arrangements with commercial operators in the Park which is creating problems for those operators wishing to offer more services, expand their facilities, or operate year round.

Recent trends have seen an increase in winter activities such as cross-country skiing, snow-shoeing, and to a lesser degree ice fishing and snowmobiling which historically have been popular winter activities. Currently the transition is from local day use activities to overnight excursions from regional to provincial and inter-provincial travel.

Operators should be cautioned to carefully evaluate the quality of their existing seasonal facilities before they winterize. Winter

accommodation will have to be of higher standard than what may be available or acceptable for the summer clientele, mainly due to the cold weather. During the summer months, most of the time is spent outdoors because of the long day light hours and the warmer temperatures; while winter days are short and cold. Amenities such as dining facilities, licenced lounge, fireplaces, saunas and games room, enhance the enjoyment of accommodation as part of winter activities.

This winter, the operation at Keeley Lake, which has a licensed beverage room and a dining facility is experiencing a 90% occupancy on weekends and approximately 50% occupancy during the week. Approximately 90% of the visitors are there to ice fish, while the balance come to cross-country ski and snowmobile.

The accommodation situation as it presently exists in the Meadow Lake Provincial Park, serves the low and medium income clientele markets. Pleasure-oriented travel seems to be confined, for the most part, to campground facilities and below average rental cabins. There is no facility geared toward the upper income or luxury market, creating a gap in available services, such as a first class food service and deluxe accommodation (motel style, condominiums or detached cabins).

4.2 Private Cottages

The private cottage rental market in the Meadow Lake Provincial Park is generally non-existent. A limited number of units may be rented, however, these tend to be done in a casual and personal manner. Typically, the average visitor to the Park would probably remain unaware of this facility. The demand for second residence accommodation is keen throughout the Park with the greatest pressure at Greig and Kimball Lakes.

In determining the need for food service in the Park, it would be desireable to determine the level of use of private cottages during the shoulder and winter seasons.

4.3 Motels and Hotels

There are no motels or hotels in the Meadow Lake Provincial Park. A significant number of motel and hotel rooms are available within one hours drive of the Park. In the study area there are 184 rooms, while at Cold Lake/Grand Centre, Alberta, there are 391 rooms available. The quality of these facilities range from above average to non-modern. The majority of the visitors to the study area tend to be campers. One motel operator in the Town of Meadow Lake suggests occupany is stable throughout the year with very little increase from the tourist segment in the summer. In fact, 70% of this operator's business is government travel related and the remaining, commercial and business travel and very little tourist trade.

4.4 Food Services

At present there are no 'sit down' dining services in the Park. Food service establishments (restaurant, licenced dining room) are available nearby at Pierceland, Meadow Lake, Loon Lake, Dorintosh, and Grand Centre/Cold Lake in Alberta.

Except for Meadow Lake and Grand Centre/Cold Lake, Alberta the remaining facilities are simple and basic in terms of service and food served. They primarily cater to the local population, construction crews, some business travel, and tourists in the summer. Even though the food is considered good "home cooked" food, the buildings and interior in some cases have deteriorated and give a negative impression of the facilities and service.

Camping is very popular in the Meadow Lake Provincial Park and area. It is for this reason that grocery stores (supplying groceries, camping/fishing equipment, etc.) are located throughout the Park, usually adjacent to the private operators (cabins and campgrounds). In addition to providing supplies to the campers, these stores cater to the many private cottage owners located throughout the Park. It would be reasonable to assume that the majority of supplies would be purchased prior to coming out to the

cottage in the owner's home community. The stores are usually open from the Victoria Day weekend in May to the Labour Day weekend in September. Most extensive recreation/grocery supply stores are often combined with a service station carrying fishing, camping, snowmobile, etc. supplies.

With the trend of increased winter activities, some food supply store operators may find it beneficial to open year round. Price competitiveness would be an important factor in the success of operating year round.

4.5 Camping

The camper market is well served in the Meadow Lake Provincial Park and region with campgrounds and related facilities and services. The excellent camping facilities combined with the natural features, especially the lakes and beaches, make the area extremely popular for Saskatchewan residents. Meadow Lake Provincial Park is especially popular with Alberta residents as Alberta is lacking in good and easily accessible lakes. Alberta visitors comprise nearly 50% of the visitors to the Park and area. In addition Saskatchewan campgrounds are superior in quality of facilities as compared to Alberta government campgrounds.

The Saskatchewan Government should continue their policy of charging market rates for campground facilities and services, to provide the funds necessary to maintain the high standards that has earned Saskatchewan an excellent reputation for provincial parks and campgrounds.

5.0 ATTRACTION OF THE MEADOW LAKE PROVINCIAL PARK

Four prime features are present in the Meadow Lake Provincial Park. First, and most important, is the protected status of the Park itself. Second, the chain of lakes located in the Park. The lakes offer excellent fishing, superior water quality, recreation potential, and an outstanding natural setting. Furthermore, the adventure of being on the edge of the wilderness provides the opportunity for the park visitor to live a new experience. The final factor is the road accessibility. Although the distance to major markets is a drawback, the quality of available facilities in northwestern Saskatchewan and northeastern Alberta is limited. The Meadow Lake Provincial Park has good highway access, but some highways are narrow and are of only fair quality compared to most major highways in Saskatchewan and Alberta.

The series of heavy oil projects in the Cold Lake/Grand Centre area of Alberta may be an attraction once they are operational. However, for most park visitors, visiting the heavy oil operation would provide no more than four hours of activity or entertainment.

The Canadian Forces Base in Cold Lake is an attraction itself. The numerous daily flights of different aircraft types, provide interest. Entrance to the base for tours is restricted to 1 1/2 - 3 hours each day but other visits could likely be arranged.

Indoor facilities (for inclement weather and non-summer season) are not feasible until such time a substantial and consistant year round market is established.

6.0 IMPLICATIONS FOR THE MEADOW LAKE PROVINCIAL PARK

- More activities should be considered for the Park. The approval of a riding academy and para-sailing are positive steps. More could be done with canoeing and sailing in the summer and for snow-shoeing in the winter,

- Nature trails, photography, and wildlife observation, and more park interpretation could be initiated.

- Incentive packages could be developed for shoulder and winter seasons. Reduced rates could be offered for accommodation during the week. Another example could be group rates on weekends. Snowmobile rides could be provided, ice fishing lessons, etc. Existing operators in the park should consider packaging the facilities and services they provide into suitable packages that encourage additional business; usually through price reduction on a certain facility or service component. New market segments might like to try ice fishing in the winter, cross-country skiing or snowmobiling in the Park but may be reluctant because they may not know how, may not have the equipment to drill a hole in the ice, may not have a snowmobile, etc.

- The large repeat summer market is a favourable factor for those existing operators who wish to expand to year round operations.

The Market Assessment section provided an overview of the past and future tourism trends. Although the terms of reference dealt mainly with the market opportunity, financial viability has to be considered as the two cannot be separated and may take many forms and combinations of facilities to succeed. The accommodation component may take a variety of formats; one large structure, a grouping of smaller buildings or a number of small units or cottages. In addition to 'accommodation', a variety of activity opportunities, plus food and beverage facilities are required. It

may be possible to successfully operate a recreation facility, motel, or restaurant in a particular area but without an obvious management capability and physical linkage among accommodation, recreation and food service element, the operations would likely fail in a limited market situation such as this.

The substantial capital investment required for the accommodation/ food service facilities implies that year round operation would be necessary. The proposed facilities should have a lake-orientation to take optimum advantage of the lake setting, scenery and lake oriented activities. These componenets should then be considered in respect to what attributes will draw people into the area. For the accommodation/food service to be successful it is necessary to consider it in the context of a resort because the characteristics are necessary as part of the "attractiveness" package.

Some of the more relevant successful characteristics are outlined below:

- That the facilities be easily accessible from major population centres, preferrably by more than one mode of travel,

- The availability of a large local market for off-season patronage, especially in the food and beverage area,

- One major focus, usually centred around the activities of a certain season (i.e. summer - fishing, golf, etc., winter - snowmobiling, cross-country skiing),

- Provision of a wide range of recreational facilities particularly in the off-season, the majority of which should be indoor oriented (i.e. saunas, games room, etc.),

- Because of the seasonality, several types of users must be attracted. In view of the chain of lakes through the Meadow Lake Provincial Park, canoeing can be more aggressively

promoted. Canoe trips can begin at Cold Lake and end at Flotten Lake. The recent approval of a riding academy and para-sailing at the west side of Greig Lake is a very positive step to increase visitation to the Park by offering a greater variety of recreational activities,

- A commitment to quality in food and beverage service and accommodation as a whole,

- A physically attractive site in this case, situated near the lake.

7.0 CONCLUSIONS AND RECOMMENDATIONS

7.1 General

Park user surveys in 1982 have shown that 30% of the users surveyed indicated that their prime reason for visiting the Park was the good fishing, with the scenic attributes of the Park ranking second, and proximity to the Park as third. This indicates how imperative it is to sustain the natural aspects of the Park in order to attract park users, as well as maintaining high quality recreational facilities. It is concluded that a long term commitment be made to fish stocking, water quality should be protected, desireable beach areas should be available to the general public, and the present strategy of cottage cluster development should continue as it is more attractive and desireable by the general public versus typical continuous cottage development around lakes.

7.2 Food Service Facility

Although a food service facility could be a profitable venture for June, July, August and September, the cost to build a facility to meet the demands and expectation of tourists could not be profitable in those few months. The following steps are being recommended that could aid the proposed food facility in being viable, possibly in two to three years.

- Year round traffic count of vehicles entering the Park and random sampling to determine the reasons for the visits. This would be extremely important in attempting to expand into the winter season.

- Survey all cottage owners in the Park to determine the number that use their cottages in the shoulder and winter season. This would be critical in determining the local market that may

support a food service at the Park. The Saskatchewan Government could do the survey, as they would have a record of all cottage owners in the Park.

- Continue to encourage new activities like snowmobiling, trail riding, para-sailing, canoeing, cross-country skiing, snow-shoeing, etc., to ensure outdoor recreation activities are available on a year round basis. By supporting these activities, it should increase visitations into the Park to further improve the viability of an accommodation or a food service facility.

7.3 Accommodation Facility

It has been concluded that there is sufficient demand on a year round basis to build an average of five to ten deluxe cabins (two and three bedroom) per year for the next five years to a maximum of twenty-five to fifty cabins in total.

An opportunity for deluxe cabins exists in a number of locations within the Park. Based on the high utilization in the Greig/ Kimball Lakes area, it would be desirable to have some cabins on the east side of Greig Lake; a lake view or treed setting. To avoid a high use impact, additional deluxe cabins could also be located on the west side, which already has been designated as a possible site for recreation facilities such as a riding academy, golf course, etc. This west side location would also be convenient for Kimball Lake residents who may have friends and relatives wishing to rent cabins near Kimball Lake.

The strength of the existing Alberta market combined with the potential that could be derived, would also support the need for deluxe cabins at Pierce Lake and Lac des Isles.

It is imperative as well that the private investor produce a

definitive long term strategy, specifically addressing factors such as location, proximity to recreation facilities (riding academy, golf course, tennis courts, etc.), future food service facility, future indoor recreation and games facility, proximity to private cottage subdivisions, etc. When a long term Park management plan is developed and approved, it will provide a further guidance for private sector investment.

Most importantly, there should be a well thought out plan of how and where the twenty-five to fifty deluxe cabins are going to be situated in relation to the park management plan and the critical factors cited in the preceding paragraph.

Commercial rental cabin operators should be initially given the opportunity to renovate, upgrade or winterize their existing rental cabins with the knowledge that they may have to compete with new deluxe facilities. This lead time may accomplish the following objectives:

a) Assist the existing operators to develop a more viable operation and in turn create more cash flow to expand their existing businesses, and
b) Test the potential of the winter market.

Any investor considering this project should be financially prepared to carry out an aggressive promotion and advertising campaign in the first two to three years.

A large motel/motor hotel type complex would not be characteristic with the natural environment theme of the park nor would it likely be supported by the current operators in the park.

APPENDIX A: TOURISM ATTRACTIONS, FACILITIES AND SERVICES

CATEGORY A: TRANSPORTATION

LOCATION	HIGHWAY ACCESS	AIR STRIP	PASSENGER RAIL	BUS	SERVICE STATION	SEWAGE DISPOSAL
SASKATCHEWAN						
Pierceland	Off Hwy 55 East of Alberta Border				X	
Peerless	On Hwy 55 East of Alberta Border					
Rapidview	On Hwy 55 East of Alberta Border					
Meadow Lake	On Hwy 55 East of Alberta Border	X		X	X	
Green Lake	On Hwy 55 East of Alberta Border				X	
Frenchman Butte	Off Hwy 3 (north) East of Alberta Border					
Onion Lake	Off Hwy 3 (north) East of Alberta Border					
Paradise Hill	Off Hwy 3 (south) East of Alberta Border				X	
Goodsoil	Via Hwy 55 East and North on Hwy 224				X	
Loon Lake	Via Hwy 55 East and South on Hwy 26	X		X	X	

CATEGORY A: TRANSPORTATION

LOCATION	HIGHWAY ACCESS	AIR STRIP	PASSENGER RAIL	BUS	SERVICE STATION	SEWAGE DISPOSAL
Barthel	Via Hwy 55 East, South on Hwy 26, East on Improved Road					
St. Walburg	Via Hwy 3 East of Alberta Border and North on Hwy 26				X	
Dorintosh	Via Hwy 55 East of Alberta Border and North on Hwy 4				X	
Waterhen Lake	Vai Hwy 55 East of Alberta Border, North on Hwy 4 and 104, off 104 on Improved Road					
Cole Bay	Via Hwy 55 East of Alberta Border, North on Hwy 4 and 104 to intersect Hwy 101					
Neeb	Via Hwy 55 East of Alberta, Southeast off Hwy 4, on Improved Hwy					
Makwa	Via Hwy 55 East of Alberta, Southwest off Hwy 4, on Hwy 304					

CATEGORY A: TRANSPORTATION

LOCATION	HIGHWAY ACCESS	AIR STRIP	PASSENGER RAIL	BUS	SERVICE STATION	SEWAGE DISPOSAL
ALBERTA						
Cherry Grove	On Hwy 55 West of Alberta Border					
Grand Centre	Via Hwy 55 West of Alberta Border and North on Hwy 28	X		X	X	X
Cold Lake	Via Hwy 55 West of Alberta Border and North on Hwy 28	X		X	X	X

CATEGORY B: FIXED ROOF ACCOMMODATION AND FOOD & BEVERAGE FACILITIES

LOCATION	Accommodation Hotel/Motel	No. of Rooms	Meeting & Convention Facilities	REST.	LIC. DIN	LOUNGE/ TAVERN	RETAIL FOOD OUTLETS	OTHER FACILITIES & SERVICES
SASKATCHEWAN								
Pierceland	2	10				O		
Peerless				I			O	
Rapidview								
Meadow Lake	5	142	O	O	O	O		
				I			O	
Green Lake	1	4						
				I			O	
Frenchman Butte	Accommodation Available but not listed in 1982 Saskatchewan Travel Guide							
Onion Lake	No Accommodation							
Paradise Hill	Accommodation Available but not listed in 1982 Travel Guide			I			O	
Goodsoil	1	6				O	O	
Loon Lake	2	16						
				I			O	
Barthel								

CATEGORY B: FIXED ROOF ACCOMMODATION AND FOOD & BEVERAGE FACILITIES

LOCATION	Accommodation Hotel/Motel	No. of Rooms	Meeting & Convention Facilities	REST.	LIC. DIN	LOUNGE/ TAVERN	RETAIL FOOD OUTLETS	OTHER FACILITIES & SERVICES
St. Walburg	1	11		O I		O	O	
Dorintosh	1	10		O		O	O	
Waterhen Lake								
Cole Bay								
Neeb								
Makwa	Accommodation Available but not listed in 1982 Travel Guide							
ALBERTA								
Cherry Grove								
Grand Centre	7	349	O	O I	O	O	O	.Three Establish-ments have Whirlpools
Cold Lake	1	42		I	O	O	O	.Pier for Boating & Fishing

CATEGORY C: CAMPGROUNDS

CH
C - Charge
F - Free

LOCATION	NAME	SITE	FACILITIES/FEATURES	OPERATOR	CH
SASKATCHEWAN					
Pierceland					
Peerless					
Rapidview					
Green Lake	Green Lake Lodge and Campground	SEE SPECIALIZED PHYSICAL TOURISM RESOURCES AND SERVICES			
Frenchman Butte					
Onion Lake					
Paradise Hill					
Goodsoil	Silver Bay Cabins and Trailer Park	SEE SPECIALIZED PHYSICAL TOURISM RESOURCES AND SERVICES			
Barthel					
St. Walburg					
Dorintosh					
Meadow Lake	Nesset Lake Recreation Area	19.2 km west of Town of Meadow Lake	.Firewood, toilets, tables. 8 sites	Municipal	F

CATEGORY C: CAMPGROUNDS

CH
C - Charge
F - Free

LOCATION	NAME	SITE	FACILITIES/FEATURES	OPERATOR	CH
Meadow Lake Provincial Park	Flotten Lake North Campground	33 km north of Park Entry	.Firewood, ice, toilets, boat rental, sewage dumping station, tap water, tables, beach, fishing, boat launch 15 sites	Sask. Prov. Parks	C
	Flotten Lake South Campground	28.8 km north of Park Entry	.Firewood, toilets, boat rentals, tap water, tables, beach, fishing, boat launch 21 sites	Sask. Prov. Parks	C
	Grieg Lake Campground	6.4 km west of Park Entry, Access from Hwy 4 or 244	.Firewood, groceries/ supplies, toilets, boat rentals, showers, laundromat, modern washrooms, sewage disposal station, tap water, phone, tables, food service, beach, playground, fishing, boat launch. 132 sites (33 sites with power)	Sask. Prov. Parks	C
	Howe Bay, Pierce Lake Campground	24 km north of Pierceland off Hwy 55	.Firewood, ice, groceries/ supplies, toilets, boat rental, laundromat, sewage disposal station, tap water, tables, beach, playground, fishing, boat launch. 15 sites	Sask. Prov. Parks	C

CATEGORY C: CAMPGROUNDS

CH
C - Charge
F - Free

LOCATION	NAME	SITE	FACILITIES/FEATURES	OPERATOR	CH
	Kimball Lake Campground	16 km west of Park Entry, Access from Hwy 224 or 26	.Firewood, groceries/ supplies, toilets, boat rental, showers, laundromat, modern toilets, sewage disposal station, tap water, phone, tables, food service, beach, playground, fishing, boat launch. 206 sites (47 sites with power)	Sask. Prov. Parks	C
	Lac Des Iles Campground	3.2 km north, 12.6 km west of Goodsoil, off Hwy 26	.Firewood, ice, groceries/ supplies, toilets, boat rentals, sewage disposal station, tap water, tables, beach, playground, fishing, boat launch. 79 sites (17 sites with power)	Sask. Prov. Parks	C
	Matheson Lake Campground	27.2 km west of Park Entry off Hwy 224	.Firewood, toilets, sewage disposal station, tap water, tables, beach, playground, fishing, boat launch. 50 sites.	Sask. Prov. Parks	C
	Mistohay Campground	35.2 km west of Park Entry	.Firewood, toilets, tap water, tables, beach, playground, fishing, boat launch. 18 sites	Sask. Prov. Parks	C

CATEGORY C: CAMPGROUNDS

CH
C - Charge
F - Free

LOCATION	NAME	SITE	FACILITIES/FEATURES	OPERATOR	CH
	Mustus Lake Campground	16 km west of Park Entry, off Hwy 224	.Firewood, groceries/ supplies, toilets, boat rental, tap water, tables, beach, fishing, boat launch 10 sites	Sask. Prov. Parks	C
	Sandy Beach, Pierce Lake Campground	24 km north of Pierce-land off Hwy 55	.Firewood, ice, toilets, boat rentals, sewage disposal station, tap water, tables, beach, play-ground, fishing, boat launch. 108 sites (6 sites with power)	Sask. Prov. Parks	C
	Vivian Lake Campground	19.2 km west of Park Entry off Hwy 224	.Firewood, toilets, tap water, tables, fishing, boat launch, hiking trails. 8 sites	Sask. Prov. Parks	C
	Waterhen Lake North Campground	24 km north of Park Entry, off 104 north side of Waterhen	.Firewood, toilets, water, picnicking, beach, fishing, boat launch. 24 sites	Sask. Prov. Parks	C
	Waterhen Lake South Campground	10 km north of Park Entry, off Hwy 104 south side of Waterhen	.Firewood, groceries/sup-plies, toilets, boat rental sewage dumping station, water, picnicking, beach, playground, fishing, boat launch.21 sites (4 w/power)	Sask. Prov. Parks	C

CATEGORY C: CAMPGROUNDS

CH
C - Charge
F - Free

LOCATION	NAME	SITE	FACILITIES/FEATURES	OPERATOR	CH
	Tawan Cabins	SEE SPECIALIZED PHYSICAL TOURISM RESOURCES AND SERVICES			
Ministikwan Lake	Ministikwan Lake Campground	32 km west of Loon Lake on Municipal Road and Hwy 21 Bronson Forest Rec.	.Firewood, toilets, boat rental, sewage dump station water, picnicking, food service, beach, fishing, boat launch. 54 sites (14 sites with power)	Sask. Prov. Parks	C
Peck Lake	Peck Lake Campground	34 km north of Paradise Hill on Hwy 21, Bronson Forest Rec. Area	.Firewood, toilets, water, picnicking, beach, playground, fishing. 42 sites	Sask. Prov. Parks	C
Worthington Lake	Worthington Lake Campground	Bronson Forest on Hwy 21	.Small campground, firewood, toilets, picnicking, fishing, boat launch. Number of sites not available.	Sask. Prov. Parks	C
Beatty Lake	Beatty Lake Campground	28.8 km north on Hwy 155	.Firewood, toilets, picnicking, beach, playground, fishing. 17 sites	Sask. Prov. Parks	C
Beaver/Cowan River Junct.	Junction of Beaver and Cowan Rivers Campground	16 km north of Green Lake on Hwy 155	.Firewood, water, picnicking, golf. 17 sites	Sask. Prov. Parks	C

CATEGORY C: CAMPGROUNDS

CH
C - Charge
F - Free

LOCATION	NAME	SITE	FACILITIES/FEATURES	OPERATOR	CH
Canoe Lake	Cole Bay Campground	On Hwy 101, 50 km west of Jct. 101 and 155	.Firewood, toilets, boat rental, water, picnicking, beach, fishing, boat launch 40 sites (20 sites with power)	Sask. Prov. Parks	C
Keeley Lake	Keeley Lake Campground	Turn off at km 64 on Hwy 104, 16 km east to Keeley Lake	.Firewood, toilets, boat rental, water, picnicking, food service, fishing, boat launch. 15 sites	Sask. Prov. Parks	F
Little Fishing Lake	Little Fishing Lake Campground	32 km north of Paradise Hill on Hwy 21 in the Bronson Forest Rec. Area	.Firewood, ice, toilets, boat rental, sewage dumping station, water, telephone, picnicking, food service, beach, fishing, boat launch 33 sites	Sask. Prov. Parks	C
Loon Lake	Jumbo Beach Campground	24 km west of Loon Lake in the Makwa Lake Rec. Area	.Firewood, ice, groceries/ supplies, toilets, boat rental, sewage dumping station, water, picnicking, food service, playground, fishing, boat launch. 18 sites	Sask. Prov. Parks	C

CATEGORY C: CAMPGROUNDS

CH
C - Charge
F - Free

LOCATION	NAME	SITE	FACILITIES/FEATURES	OPERATOR	CH
	Pine Cove Campground	Makwa Lake Rec. Area, on Makwa Lake 11.2 km north of Loon Lake on Hwy 26	.Firewood, groceries/supplies, toilets, boat rental water, telephone, picnicking, food service, beach, fishing, boat launch. 10 sites	Sask. Prov. Parks	C
	Stabler Point Campground	4.8 km west and south of Loon Lake off Hwy 26 in the Makwa Lake Rec. Area	.Firewood, toilets, boat rental, dumping station, water, picnicking, food service, beach, playground, fishing, hiking, boat launch, group area. 232 sites (10 sites with power)	Sask. Prov. Parks	C
Brightsand Lake	Brightsand Lake Regional Park	Off Hwy 26, 27 km east of St. Walburg on Municipal Road 795	.Nature trail, firewood, groceries/supplies, recreation program, sewage dumping station, water, picnicking, food service, beach, golf, fishing, boat launch. Number of sites not available.	Municipality	F
Meadow Lake	Meadow Lake Lions Regional Park	south - west edge of town	.Close to Meadow Lake, offers football field, baseball diamonds, museum on site, tourist info. centre, firewood, sewage dumping, water, phone, picnicking, food services, golf, tennis. 25 sites plus overflow sites.	Muncipality	F

CATEGORY C: CAMPGROUNDS

CH
C - Charge
F - Free

LOCATION	NAME	SITE	FACILITIES/FEATURES	OPERATOR	CH
Waterhen Lake	M & N Resort	SEE SPECIALIZED PHYSICAL TOURISM RESOURCES AND SERVICES			
Cole Bay					
Neeb					
Makwa					
ALBERTA					
Cherry Grove					
Grand Centre	Frenchman's Bay	9 km north and east of Grand Centre	.Stoves, fireplaces, firewood, tables, toilets, pump water, fishing, beach, boat launch. 25 sites	Alberta Provincial Parks	F
	Marie Lake	26 km north west of Grand Centre			
	North Bay	40 km north of Grand Centre			
Cold Lake	Cold Lake Prov. Park	3 km east of Cold Lake	.Stoves, fireplaces, firewood, tables, toilets, tap water, fishing, swimming, hiking trails, boat launch. 27 sites	Alberta Provincial Parks	C

CATEGORY C: CAMPGROUNDS

CH
C - Charge
F - Free

LOCATION	NAME	SITE	FACILITIES/FEATURES	OPERATOR	CH
	English Bay	16 km north of Cold Lake	.Shelter, stoves, fireplace, firewood, tables, toilets, pump water, fishing, beach, swimming, boat launch. 80 sites	Alberta Provincial Parks	F
	Ethel Lake	11 km west & 11 km north of Cold Lake	.Shelter, stoves, fireplace, firewood, tables, toilets, pump water, fishing, beach, boat launch. 10 sites	Alberta Provincial Parks	F

CATEGORY D: OUTDOOR RECREATION FACILITIES AND SERVICES

LOCATION	GOLF	BEACHES	HIKING AND X-COUNTRY TRAILS	MARINA/ BOAT LAUNCH	OTHER
SASKATCHEWAN					
Pierceland					.Community Parks
Peerless					
Rapidview					
Meadow Lake	O 9 hole		O		.Community Parks .St. Cyr Hills (X-Country Trails)
Meadow Lake Prov. Park		O	O	O	See Campgrounds .Snowmobile Trails .Ice Fishing .Snow Shoeing .Canoe Routes
Green Lake					.Community Park
Frenchman Butte					
Onion Lake					
Paradise Hill	O				.Community Park
Goodsoil					
Loon Lake			O		

CATEGORY D: OUTDOOR RECREATION FACILITIES AND SERVICES

LOCATION	GOLF	BEACHES	HIKING AND X-COUNTRY TRAILS	MARINA/ BOAT LAUNCH	OTHER
Barthel					
St. Walburg	Bright-Sand Lake Rec. Park				
Dorintosh					
Waterhen Lake					
Cole Bay					
Neeb					
Makwa					
ALBERTA					
Cherry Grove					
Grand Centre	O				
Cold Lake		O		O	

CATEGORY E: SECONDARY PHYSICAL TOURISM RESOURCES AND SERVICES

LOCATION	SWIMMING POOL	TENNIS COURTS	CURLING/ SKATING RINK	LIVE & MOVIE THEATRES	BOWLING FACILITIES	LIBRARY	HEALTH, HOSPITAL	OTHERS
SASKATCHEWAN								
Pierceland							O	.Churches .Laundromat .Liquor Vendor .Info at Village and R.M. offices
Peerless								
Rapidview								
Meadow Lake		O	O				O	.Liquor Store .Laundromat .Churches .Info-Town Office, C of C Information Booth (May - Sept) .Go-Cart Track .Race Track
Green Lake								.Churches .Info-LCA Office
Frenchman Butte								
Onion Lake								

CATEGORY E: SECONDARY PHYSICAL TOURISM RESOURCES AND SERVICES

LOCATION	SWIMMING POOL	TENNIS COURTS	CURLING/ SKATING RINK	LIVE & MOVIE THEATRES	BOWLING FACILITIES	LIBRARY	HEALTH, HOSPITAL	OTHERS
Paradise Hill							O	.Laundromat .Churches .Information - Village Office
Goodsoil							O	
Loon Lake			O				O	.Liquor Vendor .Churches .Information - Village Office Info Booth (Summer) .Dance Hall & Club Rooms .Library
Barthel								
St. Walburg								.Liquor Vendor .Information - Town Office, Thel's Drugs
Dorintosh								.Meadow Lake Prov. Park Office
Waterhen Lake								

CATEGORY E: SECONDARY PHYSICAL TOURISM RESOURCES AND SERVICES

LOCATION	SWIMMING POOL	TENNIS COURTS	CURLING/ SKATING RINK	LIVE & MOVIE THEATRES	BOWLING FACILITIES	LIBRARY	HEALTH, HOSPITAL	OTHERS
Cole Bay								
Neeb								
Makwa								
ALBERTA								
Cherry Grove								
Grand Centre							O	.Travel Alberta Info Centre .Farmer's Market .C of C Information
Cold Lake							O	

CATEGORY F: SPECIALIZED PHYSICAL TOURISM RESOURCES AND SERVICES

LOCATION	NAME	TYPE OF FACILITY/SERVICE	SEASON	FOOD SERVICES	ATTRACTIONS/FACILITIES
SASKATCHEWAN					
Pierce Lake Hwy 21 & 25 & Grid Road	Pierce Lake Lodge	Resort/Outfitter	May-Oct	Available	.Store .Capacity for 50 persons in 9 units .Rental of boats, motors and canoes .Licensed fishing Outfitter
Peerless					
Rapidview					
Meadow Lake Hwys 4, 55 & Fly-In	G.W. Jones Outfitters	Resort/Outfitter	May-Oct	N/A	.Rental of boats, motors .Licensed fishing, big game & bird game outfitters .Outpost camps only
	Meadow Lake Outfitters	Resort/Outfitter	May-Sept	N/A	.Rental of boats, motors .Outpost camps only .Licensed fishing & big game outfitters

CATEGORY F: SPECIALIZED PHYSICAL TOURISM RESOURCES AND SERVICES

LOCATION	NAME	TYPE OF FACILITY/SERVICE	SEASON	FOOD SERVICES	ATTRACTIONS/FACILITIES
Green Lake Hwys 55 and 155	Green Lake Lodge & Campground 2 km south of Green Lake	Resort/Outfitter	May-Oct	Available	.Capacity fo 50 persons in 10 units .Store .Rental of boats, motors .Camping .Licensed fishing & big game outfitters .Boat launch .Playground .Pets permitted .Toilets .Groceries/supplies .Water, picnic areas .40 sites (10 with power)
Frenchman Butte					
Onion Lake					
Paradise Hill					

CATEGORY F: SPECIALIZED PHYSICAL TOURISM RESOURCES AND SERVICES

LOCATION	NAME	TYPE OF FACILITY/SERVICE	SEASON	FOOD SERVICES	ATTRACTIONS/FACILITIES
Lac Des Iles Hwy 26 & 55	Big Island Cove '80	Resort/Outfitter	May-Sept	Available	.Store .Capacity for 17 persons in 5 units .Rental of boats, motors and canoes .Camping .Licensed fishing outfitter .Firewood, ice, toilets, shower, sewage, dumping station, water, telephone, picnicking, food service, beach, fishing and boat launch
	Lac Des Iles Resort	Resort/Outfitter	May-Sept	N/A	.Capacity for 90 persons in 17 units .Store .Rental of boats,motors, canoes, paddle boats .Licensed for fishing, big game, and bird game outfitters

CATEGORY F: SPECIALIZED PHYSICAL TOURISM RESOURCES AND SERVICES

LOCATION	NAME	TYPE OF FACILITY/SERVICE	SEASON	FOOD SERVICES	ATTRACTIONS/FACILITIES
1.6 km north 4.8 km west 4 km north of Goodsoil	Silver Bay Cabins and Trailer Park	Resort/Outfitter	May-Oct	Available	.Capacity for 55 persons in 11 units .Rental of motors, boats and canoes .Camping .Store .Licensed fishing outfitter .Firewood, ice, groceries/supplies, toilets, boat rentals, showers, cabins, tap water, phone, tables, food service, beach, fishing and boat launch. 18 sites with power, & cabin rentals.
Little Jumbo Lake Hwy 26 Barthel	Jumbo Beach Resort	Resort/Outfitter	May-Sept	Available	.Capacity for 60 persons in 10 units .Store .Rental of boats, motors .Licensed fishing outfitter

CATEGORY F: SPECIALIZED PHYSICAL TOURISM RESOURCES AND SERVICES

LOCATION	NAME	TYPE OF FACILITY/SERVICE	SEASON	FOOD SERVICES	ATTRACTIONS/FACILITIES
St. Walburg Dorintosh					
Waterhen Lake (North Side) Hwy 104	Waterhen Lake Resort	Resort/Outfitter	Year Round	Available	.Store .Rental of boats, motors .Winter recreation including ice-fishing, X-country skiing, snowmobiling .Licensed fishing, big game and game bird outfitters .Capacity for 6 persons in 6 units
5.12 km north of Meadow Lake, south side of Waterhen Lake.	M & N Resort	Resort/Outfitter	Year Round	Available	.Firewood, ice, groceries/supplies, boat rental, shower, laundry, modern washrooms, water, phone, picnicking, beach, playground, fishing, hiking trails, boat launch, group areas for camping. 40 sites (26 sites with power), and cabin rentals.

CATEGORY F: SPECIALIZED PHYSICAL TOURISM RESOURCES AND SERVICES

LOCATION	NAME	TYPE OF FACILITY/SERVICE	SEASON	FOOD SERVICES	ATTRACTIONS/FACILITIES
16 km north of Dorintosh south side of Waterhen Lake, 1.5 km off Hwy 104	Tawaw Cabins	Resort/Outfitter	Year Round	Available	.Firewood, ice, groceries/supplies, toilets, boat rental, showers, sewage disposal station, tap water, phone, tables, food service, beach, supervised playground, fishing, boat launch, overflow camping sites, group areas. 7 sites with power and cabin rentals
Canoe Lake Hwys 101 & 104, 50 km west of Jct.	North Haven Lodge	Resort/Outfitter	May-Oct	Available	.40 sites .Capacity for 60 persons in 12 units .Store, ice, toilets .Rental of boats, motors .Boat launch .Camping, beach, picnicking, phone, .Licensed fishing, big game and bird game outfitters

CATEGORY F: SPECIALIZED PHYSICAL TOURISM RESOURCES AND SERVICES

LOCATION	NAME	TYPE OF FACILITY/SERVICE	SEASON	FOOD SERVICES	ATTRACTIONS/FACILITIES
Keeley Lake Hwy 26	Keeley Lake Lodge	Resort/Outfitter	Year Round	Available	.Capacity for 95 persons in 13 units .Store .Licensed dining room .Rental of boats, motors and canoes .Winter recreation - ice fishing, cross-country skiing, snowmobiling .Licensed fishing, big game and bird game outfitters
Makwa Lake Hwy 26	Makwa Lake Resort	Resort/Outfitter	Year Round	Available	.Capacity for 90 persons in 16 units .Store .Rental of boats, motors and canoes .Winter recreation - ice fishing, X-Country skiing, snowmobiling .Licensed fishing outfitter
	Pine Cove Resort	Resort/Outfitter	May-Oct	Available	.Capacity for 35 persons in 7 units .Store .Rental of boats, motors .Camping .Licensed fishing outfitter

CATEGORY F: SPECIALIZED PHYSICAL TOURISM RESOURCES AND SERVICES

LOCATION	NAME	TYPE OF FACILITY/SERVICE	SEASON	FOOD SERVICES	ATTRACTIONS/FACILITIES
ALBERTA					
Grand Centre 11 km east and 5 km north of Grand Centre	Kinosoo Ridge	Ski Resort	Dec-Apr	Available	.Equipment Rental
Cold Lake					
Cherry Grove					

CATEGORY G: TOURISM EVENTS

LOCATION	NAME OF EVENT	TYPE OF EVENT	MONTH	SIGNIFICANCE
SASKATCHEWAN				
Pierceland	Pierceland Rodeo	Sport	May	Local
Peerless				
Rapidview				
Meadow Lake	Wathern Hockey Tournament	Sport	January	Local
	Flying Dust Hockey Tournament	Sport	January	Local
	Mixed Regional Curling	Sport	January	Local
	Stampeder's Hockey Tournament	Sport	January	Local
	Molson's Cup No. 3 (X-Country)	Sport	January	Regional
	Whispering Pines Tour (X-Country)	Sport	February	Regional
	Ladies Bonspiel	Sport	February	Local
	Men's Bonspiel	Sport	March	Local
	Winter Festival	Sport	March	Local
	Snowmobile Races	Sport	March	Local

CATEGORY G: TOURISM EVENTS

LOCATION	NAME OF EVENT	TYPE OF EVENT	MONTH	SIGNIFICANCE
	Spring Mixed Bonspiel	Sport	March/April	Local
	Meadow Lake Stampede	Sport	June/July	Local
	Labour Day Golf Tournament	Sport	September	Local
Green Lake	Winter Festival	Sport	February	Local
	Summer Festival	Sport	August	Local
Frenchman Butte				
Onion Lake				
Paradise Hill	Curling Bonspiel	Sport	February	Local
Goodsoil				
Loon Lake	Beer Garden	Entertainment	July	Local
	Indoor Rodeo	Sport	October	Local
Barthel				

CATEGORY G: TOURISM EVENTS

LOCATION	NAME OF EVENT	TYPE OF EVENT	MONTH	SIGNIFICANCE
St. Walburg	Multicultural Festival and Marathon	Cultural/Sport	June	Local
	Agricultural Fair	Agricultural	July/August	Local
	Royal's Baseball Tournament	Sport	August	Local
Dorintosh				
Waterhen Lake				
Cole Bay				
Neeb				
Makwa				
ALBERTA				
Cherry Grove				
Grand Centre	Northern Woods & Water Route Assoc.	Touring (Auto)	July/August	Regional
	Annual Rodeo Days	Sport	June	Local
	Agricultural Society Fall Fair	Agricultural	August	Local

CATEGORY G: TOURISM EVENTS

LOCATION	NAME OF EVENT	TYPE OF EVENT	MONTH	SIGNIFICANCE
Cold Lake	Aqua Days	Sport	August	Local
	Fish Derby	Sport	August	Local

CATEGORY H: POINTS OF INTEREST

LOCATION	NAME OF ATTRACTION	TYPE OF ATTRACTION	DESCRIPTION	SIGNIFICANCE
SASKATCHEWAN				
Pierceland	Beacon Hill Compressor Station			Local
Peerless				
Rapidview				
Meadow Lake	Meadow Lake Museum	Historic	Artifacts	Regional
Green Lake				
Frenchman Butte	Fort Pitt Historic Park	Historic	.Trading post established in 1829 by Hudson Bay Company .One of the locations of the signing of Treaty Six between the Government of Canada and the Indians	National
Onion Lake				
Paradise Hill	Roman Catholic Church	Imhoff's Paintings		Regional
Goodsoil				
Loon Lake	Big Bear Trail Museum	Historic		Regional

CATEGORY H: POINTS OF INTEREST

LOCATION	NAME OF ATTRACTION	TYPE OF ATTRACTION	DESCRIPTION	SIGNIFICANCE
Loon Lake	Steele Narrows Historic Park	Historic	.Site of the Last Battle of the Rebellion of 1885 and the last armed conflict in Canada .Plaque describing events of Rebellion and markers indicating parts of the Battlefield	National
Barthel				
St. Walburg				
Dorintosh				
Waterhen Lake				
Cole Bay				
Neeb				
Makwa				
ALBERTA				
Cherry Grove				
Grand Centre				

CATEGORY H: POINTS OF INTEREST

LOCATION	NAME OF ATTRACTION	TYPE OF ATTRACTION	DESCRIPTION	SIGNIFICANCE
Cold Lake	Father Petito Chapel	Historic	.Located at Beaver Dam .Built in 1879	Regional
	Father LeGoff Mission	Historic	.Located on the Cold Lake Reserve	Regional
	Kinosoo Totem Poles	Historic	.Located end of Hwy 28 overlooking Cold Lake .Two 22 feet cedar poles carved by chief Ovide Jacko of the Cold Lake Indian Reserve	Regional

APPENDIX B - LIST OF CONTACTS

AGENCY/ORGANIZATION	NAME	POSITION
Duck Mountain Provincial Park		
	David Orr	Park Supt.
Grand Centre		
Kinosoo Ridge Ski	Len McCabe	Ski Hill Manager
Greenwater Provincial Park		
	Ken Keely	Park Supt.
Greig Lake		
Greig Lake Store	Ken Laird	Businessman
Keeley Lake		
Keeley Lake Lodge	Peter Lafluer	Resort/Outfitter Operator
Lac Des Isles		
Lac Des Isles Resort	Jack Dzus	Resort/Outfitter Operator
Silver B Cabins and Trailer Court	Don Hotz	Resort/Outfitter Operator

LIST OF CONTACTS (Cont'd)

AGENCY/ORGANIZATION	NAME	POSITION
Lloydminster		
Saskatchewan Department of Culture and Recreation	Keith Comstock	Representative
Loon Lake		
Resident of Loon Lake	Yves Olliver	Teacher/Golf Enthusiast
R.C.M.P.	Jay Bezassi	Corporal
Saskatchewan Parks and Renewable Resources	Linda Langford	Park Planner
	Danzil Prosser	Maintenance Supervisor
	Brad Tokaruk	Resource Officer
Meadow Lake		
Meadow Lake Golf Course	Doris Young	Manager
Nor-Wester Motel	Gary Brooks	Owner/Manager
Saskatchewan Parks and Renewable Resources	Glenn Larsen	Regional Director
	Terry Swyston	Park Supt.
North Battleford		
Table Mountain Regional Park	Lawrence Blouin	Ski Hill Manager

LIST OF CONTACTS (Cont'd)

AGENCY/ORGANIZATION	NAME	POSITION
Regina		
Saskatchewan Parks and Renewable Resources	Morley Beard	Private Investment Co-ordinator
	Cal Kirby	Program Manager
	Ken Lozinsky	Supervisor
Saskatchewan Tourism and Small Business	Mike Dalidowicz	Tourism Analyst
Saskatoon		
Saskatchewan Parks and Renewable Resources	Len Arndt	Regional Director
Saskatchewan Tourism and Small Business	Gil Griffith	Representative
Waterhen Lake		
M & N Resort	Mrs. Baxton	Resort/Outfitter Operator
Tawaw Cabins	Mrs. E. Berg	Resort/Outfitter Operator
Waterhen Lake Resort	Lynn Hadden	Resort/Outfitter Operator

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definitive long term strategy, specifically addressing factors such as location, proximity to recreation facilities (riding academy, golf course, tennis courts, etc.), future food service facility, future indoor recreation and games facility, proximity to private cottage subdivisions, etc. When a long term Park management plan is developed and approved, it will provide a further guidance for private sector investment.

Most importantly, there should be a well thought out plan of how and where the twenty-five to fifty deluxe cabins are going to be situated in relation to the park management plan and the critical factors cited in the preceding paragraph.

Commercial rental cabin operators should be initially given the opportunity to renovate, upgrade or winterize their existing rental cabins with the knowledge that they may have to compete with new deluxe facilities. This lead time may accomplish the following objectives:

a) Assist the existing operators to develop a more viable operation and in turn create more cash flow to expand their existing businesses, and
b) Test the potential of the winter market.

Any investor considering this project should be financially prepared to carry out an aggressive promotion and advertising campaign in the first two to three years.

A large motel/motor hotel type complex would not be characteristic with the natural environment theme of the park nor would it likely be supported by the current operators in the park.